

STUDENT FINANCIAL ASSISTANCE
MODERNIZATION PARTNER

MONTHLY PROGRAM SCORECARDS

STATUS AS OF October 18, 2000

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Scorecard Assessment Criteria

Scorecard Measure/Assessment	Green	Yellow	Red
Overall	<ul style="list-style-type: none"> The Overall Assessment is at the discretion of the individuals completing the scorecard No quantitative guidelines (e.g. 2 Yellows = Overall Yellow) have been issued due to the different nature of each project 	<ul style="list-style-type: none"> The Overall Assessment is at the discretion of the individuals completing the scorecard No quantitative guidelines (e.g. 2 Yellows = Overall Yellow) have been issued due to the different nature of each project 	<ul style="list-style-type: none"> The Overall Assessment is at the discretion of the individuals completing the scorecard No quantitative guidelines (e.g. 2 Yellows = Overall Yellow) have been issued due to the different nature of each project
Scope	<ul style="list-style-type: none"> The scope has been defined, requirements are documented and authorized by the SFA and Modernization Partner Formal change control process has been implemented and is maintaining control 	<ul style="list-style-type: none"> The scope has been defined and requirements have been documented and authorized by the SFA and Modernization Partner Material scope issues have not been resolved and/or formal change control process has not been implemented 	<ul style="list-style-type: none"> The scope of the Task Order has not been defined and/or requirements are not documented and authorized by the SFA and Modernization Partner Unforeseen scope growth will impact the schedule baseline Change control process has not been implemented or is not maintaining control
Task Order	<ul style="list-style-type: none"> Task Order deliverable has been accepted on time per the contract 	<ul style="list-style-type: none"> Task Order has not been awarded but ATP has been issued 	<ul style="list-style-type: none"> No Task Order has been awarded No ATP has been issued
Schedule Performance Against Work Performed	<ul style="list-style-type: none"> Project is achieving milestones on schedule or ahead of schedule 	<ul style="list-style-type: none"> Project may not be meeting milestones, but a catch-up plan has been developed that is accurately reflected in the workplan 	<ul style="list-style-type: none"> Project is not meeting milestones and no catch-up plan has been developed or reflected in the workplan
Architecture	<ul style="list-style-type: none"> The Project is in full compliance with Modernization Blueprint baseline or target architecture standards or An approved change request for all deviations from the approved architecture exists 	<ul style="list-style-type: none"> The Project is deviating from Modernization Blueprint baseline or target architecture standards or A change request has been submitted but the request has not been approved 	<ul style="list-style-type: none"> The Project is deviating from Modernization Blueprint baseline or target architecture standards or A change request has not been submitted and obtained
Risk	<ul style="list-style-type: none"> Potential future risks have been identified and assessed; no impact is expected to the other Measures Project risks (if any) to successfully execute the Task Order have been identified, documented and prioritized Risk mitigation strategies are in place 	<ul style="list-style-type: none"> Potential future risks to other Measures have been identified and assessed; impacts are minimal Project risks to successfully execute the Task Order have been documented, but either: <ul style="list-style-type: none"> Some risks have not been adequately defined or Mitigation strategies have not been developed for all risks 	<ul style="list-style-type: none"> Potential future risks to other Measures have been identified and assessed; impacts are significant Project risks to successfully execute the Task Order have not been documented Mitigation strategies have not been developed
Quality	<ul style="list-style-type: none"> The Project has developed a documented quality plan and is successfully implementing the plan The Project is complying with the requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order 	<ul style="list-style-type: none"> The Project has developed a documented quality plan, but significant problems are preventing successful implementation of the plan, or The project has complied with the quality requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order, however, one or more significant program plan review issues have not been successfully resolved 	<ul style="list-style-type: none"> The Project has not developed a documented quality plan or The project is not complying with the quality requirements of the Modernization Partner program plan appropriate to the work required by the Task Order
Communication/Change Management	<ul style="list-style-type: none"> Communication and change management strategies are in place and are being implemented 	<ul style="list-style-type: none"> Minor communications issues exist Change management approach and strategy is not complete Information needs of some stakeholders are not being met in a timely manner 	<ul style="list-style-type: none"> Communications issues and change management aspects have not been documented or defined Information needs of stakeholders are not being met
Human Resources	<ul style="list-style-type: none"> Human resource needs have been documented, approved, and the appropriate resources are available Project team has the individual and group skills needed for the particular phase All staffing requests have been filled or have been unfilled for a short time with no impact to schedule 	<ul style="list-style-type: none"> Human resource needs have been documented Some responsibilities are blurred, minor resource gaps exist and/or team lacks some skills to perform successfully, or Unfilled staffing requests have been open for a period of time and have the potential to impact schedule 	<ul style="list-style-type: none"> Human resource needs have not been documented Serious resource deficiencies exist, significant individual and team skills are lacking, or Staffing requests have remained open for an extended period of time and project schedule has been impacted
Commercial Off the Shelf Software (COTS)	<ul style="list-style-type: none"> Significant reuse of hardware, software, data, and/or process is being utilized A Reuse review was conducted during conceptual or detailed design and all reuse issues have been resolved 	<ul style="list-style-type: none"> Reuse of Architecture, Design, Hardware, Software, Data and/or Process was considered, used, and candidates were identified, however, none were selected, or A Reuse review was conducted during conceptual or detailed design and issues remain unresolved 	<ul style="list-style-type: none"> Reuse of Architecture, Design, Hardware, Software, Data and/or Process was not considered and candidates were neither evaluated nor used, or A Reuse review was not conducted during conceptual or detailed design

MODERNIZATION PARTNER PROGRAM SUMMARY

	CFO	CIO							Financial Partners Channel	Schools Channel	Students Channel				Organization Transformation	
	TO 14- Financial Management Systems (FMS)	TO 9- Intranet Release 2.0 / Content Management	TO 11- Ombudsman	TO 12- School Portal and IFAP Conversion	TO 16- Enterprise Tech Architecture	TO 18, 21, & 22- Security, Data Warehousing, and Integrated Technical Architecture	TO 32- SDLC/PT Process Guide	TO 34 & 35- Applications Management Transition to Operations	Financial Partners Transformation (FPT)	TO 19- Common Origination and Disbursement	TO 15- CRM Call Center	TO 26- CDS Simplification	TO 33- FAESA on the Web Redesign	TO 37- Financial Analysis Support and Buildup	TO 29 & 31- SFA University	TO 30- HR Modernization Support
Overall	Green	Yellow	Yellow	Yellow	Yellow	Green	Green	Yellow	Yellow	Yellow	Green	Green	Green	Green	Yellow	Green
Scope	Green	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Green
Task Order	Yellow	Green	Green	Green	Green	Green	Green	Yellow	Yellow	Green	Green	Green	Green	Green	Green	Yellow
Schedule Performance Against Work Performed	Green	Red	Yellow	Red	Yellow	Yellow	Green	Green	Yellow	Yellow	Green	Green	Green	Green	Green	Green
Architecture	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Risk	Green	Yellow	Yellow	Yellow	Yellow	Yellow	Green	Yellow	Green	Green	Green	Green	Green	Green	Yellow	Yellow
Quality	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Communication / Change Management	Green	Yellow	Green	Green	Green	Yellow	Green	Red	Green	Yellow	Green	Green	Green	Green	Green	Yellow
Human Resources	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Green
Commercial Off the Shelf Software (COTS)	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green

CFO

TO 14- Financial Management System (FMS)

Go Live Date: 10/01/2000
 Modernization Partner Lead: Barry Weiss
 SFA Lead: Paul Stonner

September 20 Assessment	October 18 Assessment	Measure	Comments
Green	Green	Overall	The project has successfully met its 10/1 implementation.
Green	Green	Scope	The scope for Phase III is being defined.
Green	Yellow	Task Order	Phase III, the next task order, is still in discussion.
Green	Green	Schedule Performance Against Work Performed	The deliverables were delivered on time.
Yellow	Green	Architecture	The project is in full compliance with Modernization Blueprint baseline.
Green	Green	Risk	No new risks identified at this time. Mitigation strategies have been identified for all known risks.
Yellow	Green	Quality	Quality Assurance will be involved in Phase III. The scope of CIO involvement has been defined.
Green	Green	Communication/Change Management	The SFA team is continuing to focus on communication and change management (internal and external to the team).
Green	Green	Human Resources	The SFA team is appropriately staffed for the current work phase: testing and training.
Green	Green	Commercial Off the Shelf Software (COTS)	The Oracle Federal Financials package was implemented.

CIO

TO 9- Intranet Release 2.0 / Content Management

Go Live Date: 10/31/2000
 Modernization Partner Lead: Dave Gordon
 SFA Lead: Cheryl Queen

September 20 Assessment	October 18 Assessment	Measure	Comments
Yellow	Yellow	Overall	The content management team is continuing development and ensuring consistent implementation of functionality among applications. The development and production environments are being installed at the VDC.
Green	Green	Scope	The Scope has been defined and there are no changes to report.
Green	Green	Task Order	The task order has been awarded.
Red	Red	Schedule Performance Against Work Performed	The schedule is being rebaselined to address functional requirements and associated development efforts. Therefore the scheduled production date has shifted six weeks.
Green	Green	Architecture	The architecture is in compliance with target architecture standards.
Yellow	Yellow	Risk	Risk to the delivery schedule has been identified and is being assessed. The first implementation of new equipment and new architecture at the VDC is inherently an overall project risk.
Green	Green	Quality	Quality is being controlled through Production Readiness Reviews planned during the months of October and November.
Yellow	Yellow	Communication/Change Management	Problems with communications from team to management are being addressed. A change management process is being developed.
Green	Green	Human Resources	Human Resource needs have been documented, approved and appropriate resources are available.
Yellow	Yellow	Commercial Off the Shelf Software (COTS)	The project team is leveraging COTS products which are being integrated at the VDC. Integration of Autonomy search and Interwoven content management capabilities continue to be analyzed.

CIO

TO 11- Ombudsman

Go Live Date: 10/30/2000
 Modernization Partner Lead: Dave Gordon
 SFA Lead: Denise Hill

September 20 Assessment	October 18 Assessment	Measure	Comments
Yellow	Yellow	Overall	The team is working against the detailed workplan to complete the activities that are scheduled (user testing, train the trainers, user training, setting up the production environment) to be completed before we move into production.
Yellow	Green	Scope	The current scope is being divided into functionality that is being delivered in 3 releases.
Yellow	Green	Task Order	The initial task order has been awarded.
Yellow	Yellow	Schedule Performance Against Work Performed	The Ombudsman wants to wait until the system is delivered before accepting the deliverables in the Task Order.
Green	Green	Architecture	The team is in compliance with architecture standards. The project is using Siebel and Oracle architecture.
Yellow	Yellow	Risk	Difficulties with opening ports to enable connectivity between the VDC and the Call Centers have cost the team four work days of testing (10/9-10/13). If the ports problems are not resolved, we will not be able to implement release 1 of OCTS 2.0 on 10/31, and the date will slip one week.
Green	Green	Quality	The project is in compliance with the Modernization Partner program plan.
Green	Green	Communication/Change Management	The initial user acceptance and training sessions have been conducted and were well received. Additional sessions are scheduled for 10/19 and 10/20.
Green	Green	Human Resources	The team has obtained the appropriate Siebel resources to complete the work and is appropriately staffed.
Green	Green	Commercial Off the Shelf Software (COTS)	The project is leveraging the Siebel COTS application.

CIO

TO 12- School Portal & IFAP Conversion

Go Live Date: 11/13/2000
 Modernization Partner Lead: Dave Gordon
 SFA Lead: Sandi Foy-McCabe

September 20 Assessment	October 18 Assessment	Measure	Comments
Yellow	Yellow	Overall	The teams are progressing with integration testing activities. Component testing was completed on 10/3. User Acceptance Testing is pending completion of integration testing begins 10/4. Production migration is being planned.
Green	Green	Scope	Scope is defined and understood by Schools Channel, OCIO and Modernization Partner. No changes to scope have been reported.
Green	Green	Task Order	The task order is being modified for extension in period of performance.
Red	Red	Schedule Performance Against Work Performed	The overall schedule has slipped one month due to various integration problems. Component testing has been completed. Integration testing began on 10/4 and a number of issues are still being resolved. Integration testing is anticipated to end 10/18. While minimal User acceptance testing has begun it is likely to end 10/20. The Beta testing schedule is subject to revision based on successful integration and user acceptance testing. The 10/26 production date may be impacted dependent upon successful completion of testing and migration to production.
Yellow	Green	Architecture	The architecture is in compliance with target architecture standards.
Yellow	Yellow	Risk	Technical issues related to integration of COTS components as well as successful delivery of application functionality, continue to be identified & resolved.
Green	Green	Quality	Quality is being controlled through production readiness reviews and the system investigation request (SIR) process throughout the testing efforts.
Green	Green	Communication/Change Management	Change management processes are being used for integration and user acceptance testing.
Green	Yellow	Human Resources	Human resource needs have been documented and approved. Extensions for resources are underway and will be discussed with SFA.
Yellow	Green	Commercial Off the Shelf Software (COTS)	The School Portal and IFAP teams are both making use of COTS products for their solutions. The COTS products are being integrated at the VDC in both the development/testing and production environments.

CIO

TO 16- Enterprise Tech Architecture

Go Live Date: N/A
 Modernization Partner Lead: Dave Gordon
 SFA Lead: Wayne Wright

September 20 Assessment	October 18 Assessment	Measure	Comments
Yellow	Yellow	Overall	Overall the team is progressing. They are finalizing the installation of the development architecture and production architectures while supporting application, installation and testing efforts.
Yellow	Yellow	Scope	The technical architecture team is effectively managing the scope of its technical infrastructure build.
Yellow	Green	Task Order	The task order has been awarded.
Yellow	Yellow	Schedule Performance Against Work Performed	Hardware delays, environment set-up, increasing number of support-related requests and migration of applications from offsite loaner boxes to the VDC have impacted the schedule by taking time away from scheduled tasks such as technical QA, migration planning review and product functionality validation. A revised schedule is being developed to identify timeframes and dependencies with application efforts. Progress is being made for the build & test of the development and production environments.
Green	Green	Architecture	The majority of the development and production architecture products have been installed, configured, tested and stabilized at the VDC.
Yellow	Yellow	Risk	Hardware procurement/delivery issues appear to be resolved. The first implementation of new equipment and new architecture at the VDC is inherently an overall risk.
Green	Green	Quality	Quality reviews of technical architecture and projects are in place.
Green	Green	Communication/Change Management	The team is in the process of developing a Technical Architecture Road-Show in collaboration with IT Management to communicate functional services provided by the products. In addition, monthly scheduled Technical Architecture Open-Forum meetings have been sponsored by IT Management to communicate what the architecture provides and how it enables the business.
Green	Green	Human Resources	Staff positions have been filled to support Technical Architecture including dedicated DBA and System Administrator support at the VDC.
Green	Green	Commercial Off the Shelf Software (COTS)	All technical functions and services are being supported by COTS products.

CIO

TO 18, 21, & 22- Security, Data Warehousing and Integrated Technical Architecture

Go Live Date: N/A

Modernization Partner Lead: Dave Gordon

SFA Lead: Yateesh Katyal

September 20 Assessment	October 18 Assessment	Measure	Comments
Yellow	Green	Overall	The Security and Integrated Technical Architecture (ITA) team deliverables are on schedule. The Data Warehousing initiative has been revised to demonstrate a Proof-of-Concept.
Green	Green	Scope	The scope for Security, Integrated Technical Architecture (ITA) and Data Warehousing architecture projects have been defined.
Red	Green	Task Order	The Integrated Technical Architecture (ITA) (TO22), Data Warehousing (TO21) and Security and Privacy Program (TO18) task orders have been awarded.
Red	Yellow	Schedule Performance Against Work Performed	The Security and ITA teams are on schedule with deliverables. The Data Warehousing schedule has been revised to include a Proof-of-Concept; the plan for the Proof-of-Concept is scheduled for 10/20.
Green	Green	Architecture	The projects are implementing the enterprise standard architecture.
Yellow	Yellow	Risk	The Datawarehouse project has been delayed due to additional required coordination with the business channels to ensure the proper support and outcome.
Green	Green	Quality	The project is complying with the requirements of the program plan, appropriate to the work required by the Task Orders.
Yellow	Yellow	Communication/Change Management	The Datawarehouse project is working on defining communication requirements and alternatives with the business channels.
Yellow	Green	Human Resources	All staffing requests have been filled and resources are available.
Green	Green	Commercial Off the Shelf Software (COTS)	The Data Warehouse team is using Microstrategy and Informatica products to deliver the solution. These COTS products have been integrated at the VDC.

CIO

TO 32- SDLC/IPT Process Guide

Go Live Date: N/A
 Modernization Partner Lead: Dave Gordon
 SFA Lead: Connie Davis

September 20 Assessment	October 18 Assessment	Measure	Comments
Green	Green	Overall	Project work is on schedule.
Green	Green	Scope	The scope of the project has been defined. Team has been meeting with CIO executives to validate scope of SDLC/IPT Process Guide.
Yellow	Green	Task Order	Task Order has been officially awarded by SFA.
Green	Green	Schedule Performance Against Work Performed	Activities and deliverables are on schedule. Deliverable 32.1.1, Project Work Plan was delivered on schedule.
Green	Green	Architecture	Not applicable; enterprise architecture standards will be incorporated into the SDLC as appropriate.
Green	Green	Risk	No risks have been identified.
Green	Green	Quality	An independent team (Software Engineering Institute) has been retained to provide quality recommendations.
Green	Green	Communication/Change Management	An IPT process is being utilized to ensure communications. The CIO core team has been established; continuing dialogue with other stakeholders.
Green	Green	Human Resources	The project is staffed with the appropriate resources.
Green	Green	Commercial Off the Shelf Software (COTS)	Not applicable.

CIO

TO 34 & 35- Applications Management Transition to Operations

Go Live Date: N/A

Modernization Partner Lead: Phill Thomas

SFA Lead: Karen Freeman (TO 34), Paul Stonner (TO 35)

September 20 Assessment	October 18 Assessment	Measure	Comments
Green	Yellow	Overall	The Transition team is progressing with tasks identified in the transition plan.
Yellow	Green	Scope	The scope for Applications Management is defined.
Red	Yellow	Task Order	SFANet and FMS Applications Management Transition task orders have been awarded. IFAP/School Portal is pending.
Green	Green	Schedule Performance Against Work Performed	The project is achieving milestones on a timely basis.
Green	Green	Architecture	Not Applicable
Yellow	Yellow	Risk	Potential future risks to other measures have been identified and assessed; impacts are minimal.
Green	Green	Quality	Quality is being controlled through stakeholder and Production Readiness reviews.
Yellow	Red	Communication/Change Management	With respect to Task Order requirements and scope, communication with key stakeholders has been lacking. A plan has been prepared to address this and key stakeholders will provide input to team on October 7th.
Green	Green	Human Resources	Human Resource needs have been documented, approved and appropriate resources are available.
Green	Green	Commercial Off the Shelf Software (COTS)	Not Applicable

FINANCIAL PARTNERS CHANNEL

Financial Partners Transformation (FPT)

Go Live Date: N/A
 Modernization Partner Lead: Chris Ward
 SFA Lead: John Reeves

September 20 Assessment	October 18 Assessment	Measure	Comments
Green	Yellow	Overall	The FPT projects for the Analysis and Design phase are complete. However, task order proposals for the next phase of work have been delayed as a result of a transition with the FP General Manager position. The new GM, John Reeves, will begin during the week of 10/16.
Green	Green	Scope	The scope of the Financial Partners Transformation program and Modernization Partner support have been defined and agreed to by all parties.
Green	Yellow	Task Order	The Acting GM has accepted the revised deliverables for task orders #10 and #23. Task Order #40 will be submitted to Carol Seifert during the week of 10/16. Statement of Objectives for Risk Modeling/Data Mart and Employee Empowerment initiatives are on hold until the week of 10/16 when the new GM starts.
Green	Yellow	Schedule Performance Against Work Performed	As mentioned above, several task orders and statement of objectives are on hold until the week of 10/16 when the new GM starts.
Green	Green	Architecture	There will be an assessment of architectures.
Green	Green	Risk	Project risks to successfully execute the Task Order of work have been documented.
Green	Green	Quality	The project is complying with the requirements of the program plan, appropriate to the work required by the Task Order.
Green	Green	Communication/Change Management	Communication and change management strategies have been incorporated as part of the project's current and future work plan.
Green	Green	Human Resources	There are no outstanding Human Resource needs.
Green	Green	Commercial Off the Shelf Software (COTS)	Currently reviewing the Risk Modeling function to determine if a COTS package is needed.

SCHOOLS CHANNEL

TO 19- Common Origination and Disbursement

Go Live Date: N/A

Modernization Partner Lead: Katie Crowley, Gene Murphy

SFA Lead: Mary Haldane, Denise Merchant

September 20 Assessment	October 18 Assessment	Measure	Comments
Green	Yellow	Overall	The overall assessment for implementing the COD Phase II project plan is good. Schedule slippage is a key contributor to the yellow score (refer to Schedule Performance Against Work Performed).
Green	Green	Scope	The TO scope has been defined and agreed to by Schools channel representatives and the Modernization Partner.
Green	Green	Task Order	The Task Order has been awarded.
Yellow	Yellow	Schedule Performance Against Work Performed	Revisits with vendors are required to answer final key questions prior to completing Preferred Solution Selection. Revisions to dates (replan) of three deliverables: Preferred Solution Selection, Implementation Plan and the Business Case have been informally agreed to - task order modification now in progress. Current task order expires 11/15 - proposal is for extension through 2/28/01.
Green	Green	Architecture	The Project is in full compliance with the Modernization Blueprint baseline and/or target architecture standards. The project has not defined any architecture changes.
Green	Green	Risk	Project risks to successfully execute the Task Order of work have been documented, and mitigation strategies have been defined.
Green	Green	Quality	SFA participation continues to increase. Workgroups of SFA and Modernization Partner personnel have been established and kicked-off. These workgroups incorporate existing business functional expertise with COD goals.
Green	Yellow	Communication/Change Management	While communication strategies have been incorporated as part of the project's future work plan and resources have been identified to focus on change management issues, current change management expert efforts will focus on impacts to the SFA organization as a result of COD implementation. Communication to SFA Schools staff has not been initiated in earnest as previously planned.
Green	Green	Human Resources	Human resource needs have been documented and approved. The project team has one need - for financial analysis support to assist in the development of the COD Implementation (Phase III/IV) Business Case. Two recent staff additions have strengthened technology assessments for the Preferred Solution Selection, as well as the business/functional knowledge required for development of the implementation plan.
Green	Green	Commercial Off the Shelf Software (COTS)	A review of COTS products has been incorporated into the project's work plan.

STUDENTS CHANNEL TO 15- CRM Call Center

Go Live Date: N/A

Modernization Partner Lead: Jim Phillips

SFA Lead: Dena Bates

September 20 Assessment	October 18 Assessment	Measure	Comments
Green	Green	Overall	The CRM / Call Center IPT is on schedule and has completed Current Environment, Best Practices and Gap Analysis Phases. Solutions Generation Session occurred on 9/27/00. Solution Selection Phase is underway. Meetings with project leadership for solution discussions are being scheduled. Quick Hits referral guide has been printed and has been tested by CSRs. Final edits will be made for mass distribution to the call centers. Interactive Voice Response Unit modifications for Spanish options are complete and call transfers are being conducted between major centers.
Green	Green	Scope	There has been no scope change for the IPT.
Green	Green	Task Order	The task order has been awarded.
Green	Green	Schedule Performance Against Work Performed	Project is achieving milestones on schedule.
Green	Green	Architecture	The Project is in full compliance with Modernization Blueprint baseline or target architecture standards. This project involves assessment and definition of CRM / Call Center reengineering options and does not affect architecture. Meetings have been scheduled regarding cross IPT inputs (CIO, Schools, etc.).
Green	Green	Risk	No risks are currently identified.
Green	Green	Quality	The Project has developed a quality plan and the project is complying with the requirements of the program plan, appropriate to the work required by the Task Order. Deliverable content has been reviewed by independent, outside CRM subject matter experts.
Green	Green	Communication/Change Management	Communication strategies have been incorporated as part of the project's work plan. A plan for reporting findings has been incorporated into project plan and process maps. All project findings have been communicated to stakeholders. A CRM communications "Road Show" has been developed, and meetings with stakeholders are currently being conducted.
Green	Green	Human Resources	Staffing requirements have been satisfied for the IPT and subteams. All outstanding staffing requests have been filled. Interaction Associates is the sub-contractor for facilitation and process mapping activities.
Green	Green	Commercial Off the Shelf Software (COTS)	A review of COTS products has been incorporated into the project's work plan. Several CRM applications will be reviewed in the Best Practices phase of the project. COTS reviews and vendor demonstrations are scheduled and will take place soon.

STUDENTS CHANNEL TO 26- CDS Simplification

Go Live Date: 11/17/00

Modernization Partner Lead: Kerry Trahan

SFA Lead: Jeanne Van Vlandren

September 20 Assessment	October 18 Assessment	Measure	Comments
Green	Green	Overall	System Integration Testing for Loan Origination and Loan Servicing has completed and InterSystem Testing has begun. Coding continues for Loan Consolidation and Data Warehousing.
Green	Green	Scope	The scope has been defined, requirements are documented and authorized by SFA and Modernization Partner.
Green	Green	Task Order	The Task Order has been awarded.
Green	Green	Schedule Performance Against Work Performed	The work within this project is on schedule.
Green	Green	Architecture	The Project is in full compliance with Modernization Blueprint baseline or target architecture standards. The project has not defined any architecture changes.
Green	Green	Risk	Project risks to successfully execute the Task Order of work have been documented, and mitigation strategies have been defined.
Green	Green	Quality	Deliverables have been peer reviewed and reviewed by independent SQA reviewers. SQA reviews on project management are completed regularly.
Green	Green	Communication/Change Management	Communication strategies have been incorporated as part of the project's work plan. JAD sessions for requirements and detailed design are taking place among SFA, Andersen Consulting, ACS, and EDS. Implementation planning meetings are held weekly to coordinate the implementation of the systems into production.
Green	Green	Human Resources	Resources are fully staffed.
Green	Green	Commercial Off the Shelf Software (COTS)	A data warehouse COTS product is now being utilized.

STUDENTS CHANNEL TO 33- FAFSA on the Web Redesign

Go Live Date: N/A

Modernization Partner Lead: Martin Renwick / Grace N. Yakubisin

SFA Lead: Jeanne Saunders

September 20 Assessment	October 18 Assessment	Measure	Comments
Green	Green	Overall	Project is progressing on schedule.
Green	Green	Scope	The scope for release six has been defined, requirements are documented and authorized by SFA and Modernization Partner.
Green	Green	Task Order	The task order has been awarded. The task order for the next phase of the project is currently being drafted.
Green	Green	Schedule Performance Against Work Performed	The first phase has been completed.
Green	Green	Architecture	We are currently meeting with CIO to determine how to incorporate the Internet Standards into our project. The core team has discussed the options with CIO and documented the advantages and disadvantages of each option.
Green	Green	Risk	Potential future risks have been identified and assessed. Risk mitigation strategies are in place.
Green	Green	Quality	The Project is complying with the requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order.
Green	Green	Communication/Change Management	Communication strategies are in place and are being implemented. Change management strategies for the next task order are being defined.
Green	Green	Human Resources	There are no outstanding staffing requests at this time.
Green	Green	Commercial Off the Shelf Software (COTS)	There are no COTS packages implemented for this task order.

STUDENTS CHANNEL

TO 37- Financial Analysis Support and Buildup

Go Live Date: N/A
 Modernization Partner Lead: Louella Gorman
 SFA Lead: Jeanne Van Vlandren

September 20 Assessment	October 18 Assessment	Measure	Comments
Green	Green	Overall	The project is currently on schedule.
Green	Green	Scope	The Task Order scope has been defined and agreed to by Students Channel representatives.
Green	Green	Task Order	The Task Order has been awarded.
Green	Green	Schedule Performance Against Work Performed	The project will achieve Task Order milestones on schedule.
Green	Green	Architecture	NA
Green	Green	Risk	No risks have been identified.
Green	Green	Quality	The project plan is being executed as intended and is complying with the requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order.
Green	Green	Communication/Change Management	NA
Green	Green	Human Resources	The project is adequately staffed.
Green	Green	Commercial Off the Shelf Software (COTS)	NA

ORGANIZATION TRANSFORMATION TO 29 & 31- SFA University

Go Live Date: 9/29/2000

Modernization Partner Lead: Doreen Barrett

SFA Lead: Anne Teresa

September 20 Assessment	October 18 Assessment	Measure	Comments
Yellow	Yellow	Overall	The project is redefining expectations for Front-to-Back Training Course development and development of web-based tool for Front-to-Back training.
Yellow	Yellow	Scope	The scope of work for SFA University Modernization Support and Front-to-Back needs to be revisited.
Green	Green	Task Order	TO 29 Modernization Support, and TO 31 Front-to-Back have been awarded.
Green	Green	Schedule Performance Against Work Performed	Scheduled performance against work performed is as planned and on target.
Green	Green	Architecture	The project is in full compliance with the Modernization Blueprint baseline and target architecture standards. The project has not defined any architectural changes.
Yellow	Yellow	Risk	Risks associated with completion of Front-to-Back training have been identified, and mitigation strategies are being implemented with client involvement.
Green	Green	Quality	The project is complying with the requirements of the Modernization Partners program plan, appropriate to the work required by the Task Order.
Green	Green	Communication/Change Management	A communication strategy that identifies stakeholders and processes for involvement of sponsors and subcontractors in the design, development, and implementation of products has been developed.
Yellow	Yellow	Human Resources	The revision of TO 31 requires an increase in the number of resources needed. A technical consultant with web-based development and coding skills is required to develop the web-based tool for Front-to-Back.
Yellow	Green	Commercial Off the Shelf Software (COTS)	Currently focused on identifying appropriate web-based <u>materials</u> that can be incorporated into a web-based <u>tool</u> at a later point.

ORGANIZATION TRANSFORMATION TO 30- HR Modernization Support

Go Live Date: 12/04/00
Modernization Partner Lead: Kim Morris
SFA Lead: Calvin Thomas

September 20 Assessment	October 18 Assessment	Measure	Comments
Yellow	Green	Overall	The work is progressing as planned based on a revised Performance Development Process roll-out date of December 4, 2000.
Green	Green	Scope	HR Modernization Support Task Order reflects work efforts currently underway.
Green	Yellow	Task Order	Currently working on a modification to the Task Order to ensure all work efforts for the December 4 implementation of the Performance Development Process are covered, and to include additional support requested by the client.
Yellow	Green	Schedule Performance Against Work Performed	Performance is progressing as scheduled based on the revised implementation date of December 4, 2000.
Green	Green	Architecture	The project is in full compliance with the Modernization Blueprint baseline and target architecture standards.
Yellow	Yellow	Risk	Risks to a successful execution of the Task Order have been documented, and mitigation strategies have been defined. The team has been working closely with SFA Human Resources to ensure General Counsel, Office of Personnel Management, and Dept of Education HR Group review the Performance Development Process for final approval. All of these parties are currently reviewing materials with a target response date of October 16. At this time, we are not certain what revisions may be required to the program based on these reviews.
Green	Green	Quality	The project is complying with the requirements of the program plan, appropriate to the work required by the Task Orders.
Yellow	Yellow	Communication/Change Management	Communication and change management strategies have been identified and incorporated into the project work plan, however, at the request of the union, a detailed draft document was shared with employees prior to setting appropriate context. The team has been working with SFA HR to set this context to minimize employee confusion regarding the program. Formal communication about the roll-out of the program has been delayed at the request of Calvin Thomas. Calvin Thomas has requested that we minimize detailed communication sent to employees until critical Department of Education stakeholders formally approve the new process.
Green	Green	Human Resources	Project team has identified resources and skills needed and immediate staffing needs have been met.
Green	Green	Commercial Off the Shelf Software (COTS)	SFA has selected Perform.com as its ASP solution for the new Performance Development Process.